



Agenda

- CRM Overview
- Lightning for Gmail
 - Who should be using it
 - Activities you can perform using it
- Demo
- Guidelines to use
- Lightning for Gmail Chatter Group
- Questions



CRM

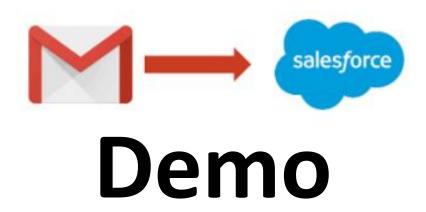
- What is CRM
 - Practice, strategies and technologies used by company to manage, retain and improve customer interactions.
 - Accounts, Contacts and Task/Activities
 - Challenges



What is Lightning for Gmail?

- Lightning for Gmail allows users to access their Salesforce instance directly from their Gmail Inbox and eliminates the need to switch back and forth between applications.
- With Lightning for Gmail, you can add a contact, email, event or opportunity directly from Gmail to Salesforce in just a few clicks.
- Users can also increase their efficiency by using already created Salesforce email templates within Gmail.







Guidelines for Use

Do not sync sensitive data to Salesforce (e.g., SSN)	0
Do not sync personal Emails, Contacts and Events to Salesforce	0
Do sync Contacts, Events and Emails that relate to your Salesforce Accounts, Contacts, Leads and Opportunities	~



Lightning for Gmail Chatter Group

Chatter Group



Questions?

